

Updating a Recurring DMS Payment

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Donor Management System

After adding a recurring [DMS Live Payment](#), you can easily update the donor's billing information and a few other details anytime.

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Considerations

- At this time, if you need to update the *amount* or *frequency* for **either a credit card or EFT** recurring payment, you'll simply need to [cancel it](#) and [set up a new live payment](#) reflecting the desired changes.
- Currently, you can only **update billing information** for a live payment made **via credit card**.
 - To change a donor's **bank account details** (for EFT live payments), you'll need to login to your [iATS Portal](#) directly.
- For security reasons, you can only update one recurring DMS Payment at a time.

Identifying the Recurring DMS Payment

1. Visit the **Contributions Tab**

2. **Search for the recurring DMS Contribution** you wish to update and **select the Contact's name**

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Dashboard Contacts **Contributions** Campaigns Opportunities Reports DMS Mail

Settings | Help DMSCA DMSCA

Search by contributor name or email Advanced Search

Actions 0 Selected Records Only All 1452 Records

All Contributions Advanced Actions Add Contribution

Received	Name	Amount	Fund	Campaign	Source	Method	Status	Receipt No.	Thanked
March 2nd, 2023 10:30 AM	A. L. Kostenko	\$78.00	Community Outreach Fund		DMS Manual	Cash	Completed		-
March 2nd, 2023 10:16 AM	A. L. Kostenko	\$88.00	General Fund		DMS Manual	EFT	Completed		-
March 2nd, 2023 10:13 AM	Lucas Froese	\$100.00	General Fund		DMS Manual	Cash	Completed	WELL00000923	✓
March 2nd, 2023 01:59 AM	Benjamin Franklin	\$1.23	Fitness	Bottle Drive	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed		-
March 1st, 2023 05:34 PM	Nicole Lam	\$200.00	General Fund		DMS Manual	Cheque	Completed	WELL00000922	✓
March 1st, 2023 05:26 PM	Munoz Jordan	\$20.00	General Fund	Fundraising for peace		Cheque	Completed		-

Select a Contact's name

4. You will be directed to the Contact's Profile. From there, select **Contributions**

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Settings | Help DMSCA DMSCA

Benjamin A Franklin

Actions Edit

Summary **Contributions 200** Activities 430 Relationships 1 Groups 5 Notes 1 Tags 0 Opportunities

Home Address
45 Wellington Ave
Ottawa, ON K1A 0A6
Canada

Billing Address
CELINA A BERNAL
231 Daly Ave, Apt 2
Ottawa, ON K1N 6G1
Canada

Home Email celinaabernalq_321@gmail.com

Billing Email celinaabernalq_321@gmail.com

Phone

Website

Summary Fields

Total Lifetime Contributions 5,786.16

Amount of last contribution 1.23

Date of Last Contribution 03/02/2023 1:59AM

Date of First Contribution 07/22/2022 9:11AM

Largest Contribution 1,850.00

Count of Contributions 200

Tags

Contact Type Individual

Contact ID 388

External ID

Gender

Date of Birth

Age

Employer

Job Title

Recognition Name

Source CanadaHelps

Delete Contact

View the Contact's Contribution history

5. You will see a list of all the Contributions associated with that Contact. Then, select **DMS Recurring Contributions**

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Dashboard Contacts **Contributions** Campaigns Opportunities Reports DMS Mail

Settings | Help

DMSCA DMSCA

Benjamin A Franklin

Actions Edit

Summary Contributions 200 **DMS Recurring Contributions 1** Activities 430 Relationships 1 Groups 5 Notes 1 Tags 0 Opportunities

Contributions 200 **DMS Recurring Contributions 1**

Current Year-To-Date - \$ 1,123.80 # Completed Contributions - 62 Avg Amount - \$ 18.13

Total - \$ 5,786.16 # Completed - 200 Avg - \$ 28.93

Click arrow to view payment details.

Add Contribution

Received	Amount	Fund	Campaign	Method	Method	Status	Receipt No.	Thanked
March 2nd, 2023 01:59 AM	\$1.23	Fitness	Bottle Drive	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed	-	-
March 1st, 2023 01:51 AM	\$1.23	Fitness	Bottle Drive	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed	-	-
February 28th, 2023 01:38 AM	\$1.23	Fitness	Bottle Drive	DMS Payments Credit Card Contribution (Recurring)	Credit Card	Completed	-	-

DMS Recurring Contributions

6. Identify the Contribution you wish to update and select **More**

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Settings | Help

DMSCA DMSCA

Benjamin A Franklin

Actions Edit

Summary Contributions 200 **DMS Recurring Contributions 1** Activities 430 Relationships 1 Groups 5 Notes 1 Tags 0 Opportunities

Contributions 200 **DMS Recurring Contributions 1**

This section only reflects recurring contributions set up through your DMS payment processor.

Active Recurring Contributions

Amount	Frequency	Start Date	Installments	Payment Processor	Status
\$1.23	Every 1 day	Aug 19th, 2022 9:44 AM	Ongoing	Credit card	Ongoing

Inactive Recurring Contributions

Amount	Frequency	Start Date	Installments	Payment Processor	Status
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Delete Contact

Select More to update

7. Afterwards, you'll be able to:

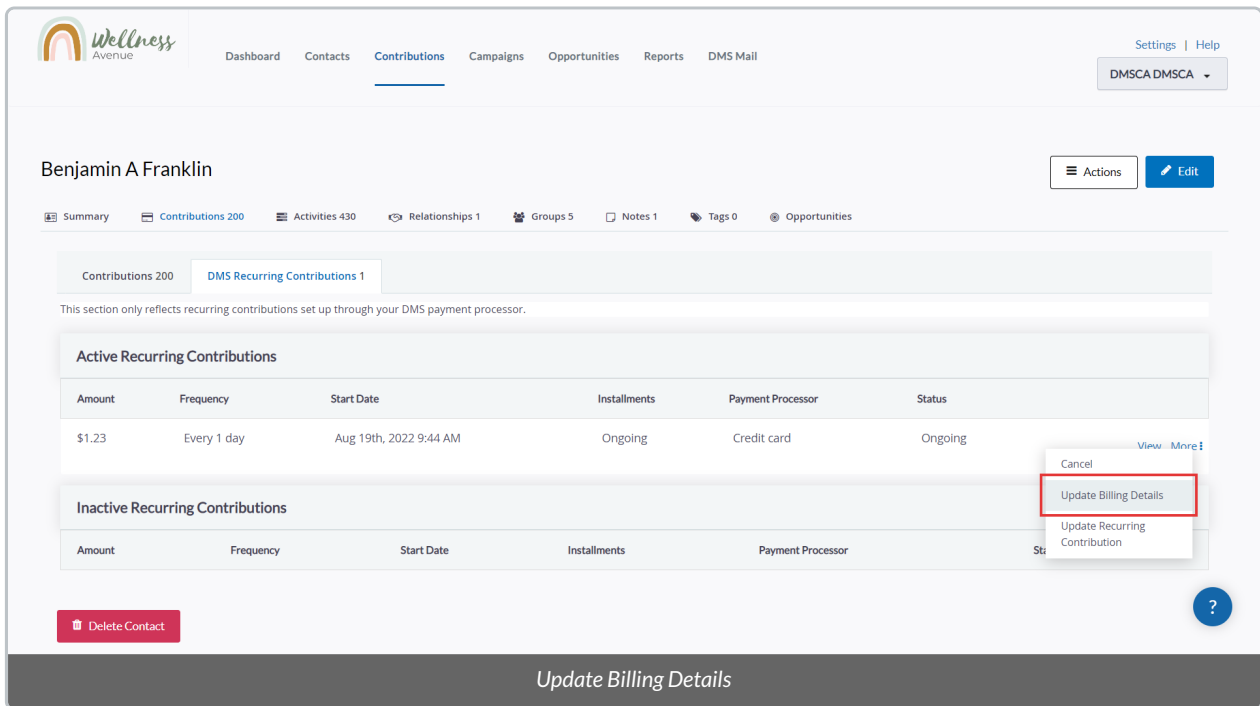
- a. Cancel the DMS Recurring Contribution,
- b. Update its billing details (for credit card payments)
- c. Update a few other Contribution details (see below)

Updating Billing Details

This section will highlight how you can change the billing information for a donor's recurring **credit card live payment**.

Reminder: To change a donor's **bank account details** (for EFT live payments), you'll need to login to your **iATS Portal** directly.

1. Identify the **DMS Recurring Contribution** you're looking to update the billing details for
2. Once you've identified the Contribution, click **More**, then select **Update Billing Details**



3. On the next page, you'll be able to update the Contact's **Payment Method** as needed and **Save**.

Dashboard Contacts Contributions Campaigns Opportunities Reports DMS Mail

Update Billing Details

Recurring Contribution Details: \$1.23 every 1 day
Use this form to update the credit card and billing name and address used for this recurring contribution.

Credit Card

Card Type: - select -

Card Number *

Security Code *

Expiration Date *
-month- -year-

Billing Name and Address

Billing First Name * Benjamin

Billing Middle Name A

Billing Last Name * Franklin

Street Address * 231 Daly Ave, Apt 2

City * Ottawa

Country * Canada

Cancel Save

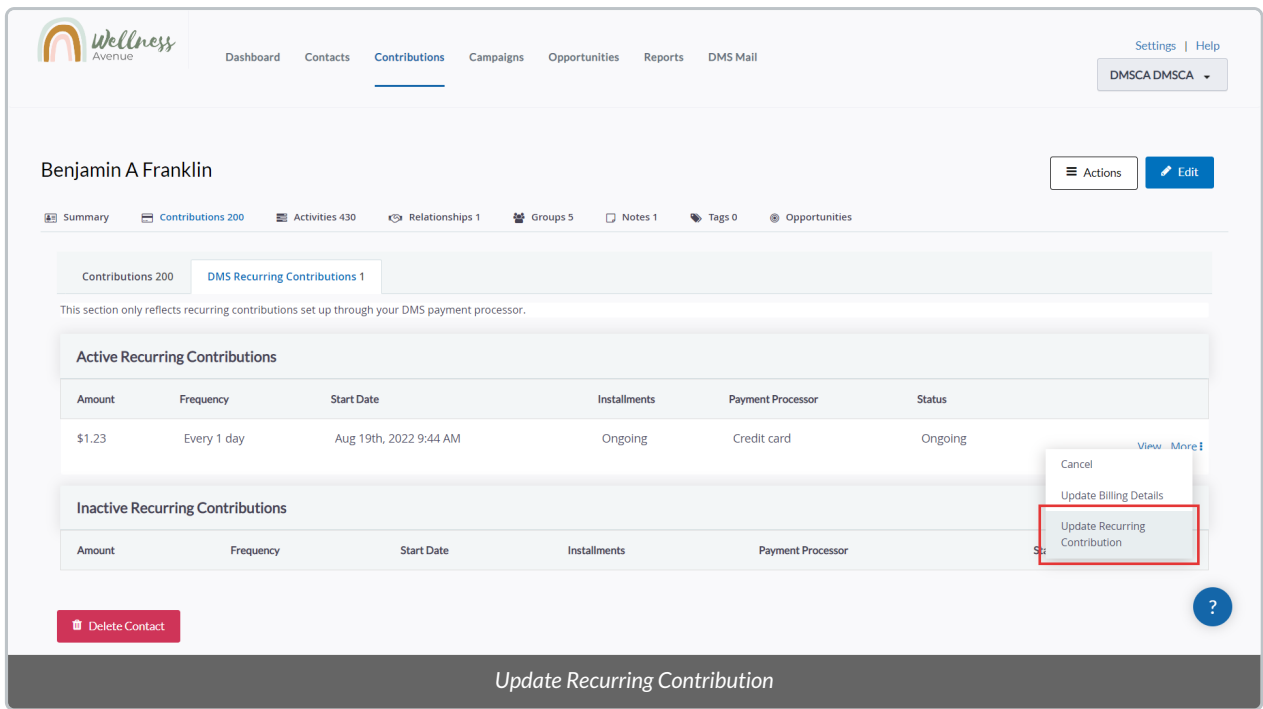
Update Billing Details and Save

Reminder: Credit card expiry dates don't automatically update in the DMS. For any expired credit cards, you'll need to update the billing details manually following the steps above.

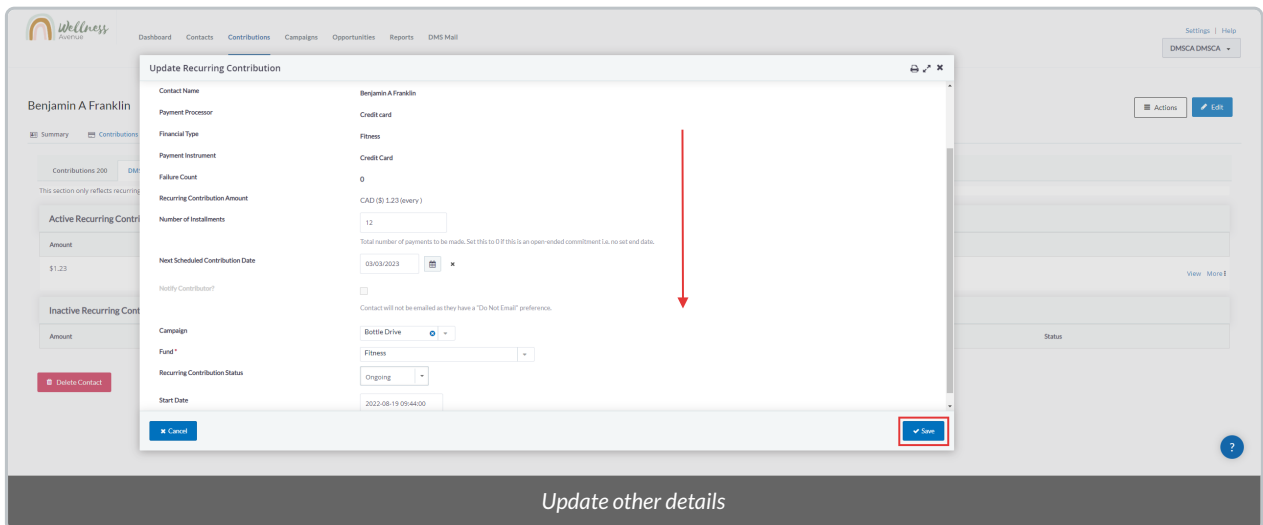
Tip: Want to know which DMS payments have credit cards that will expire soon? [Learn more!](#)

Updating Other Details

1. Follow the steps above to [identify the DMS Recurring Contribution](#) you wish to update the additional details for
2. After selecting *More*, select *Update Recurring Contribution*

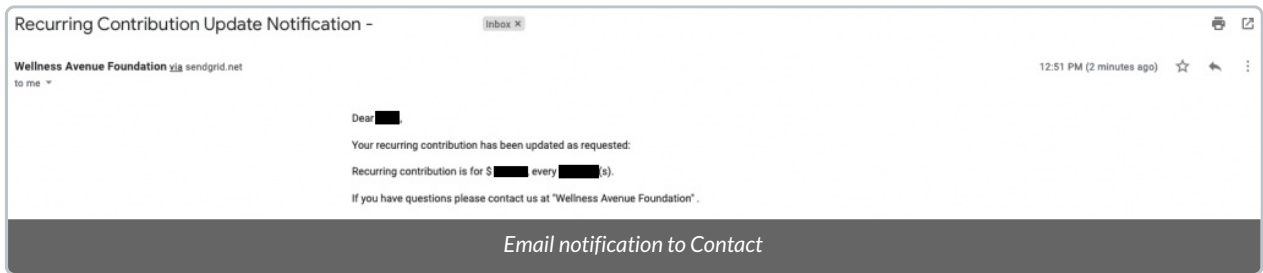


3. On the next page, you'll be able to update the **following fields**, and select **Save** when you're done.



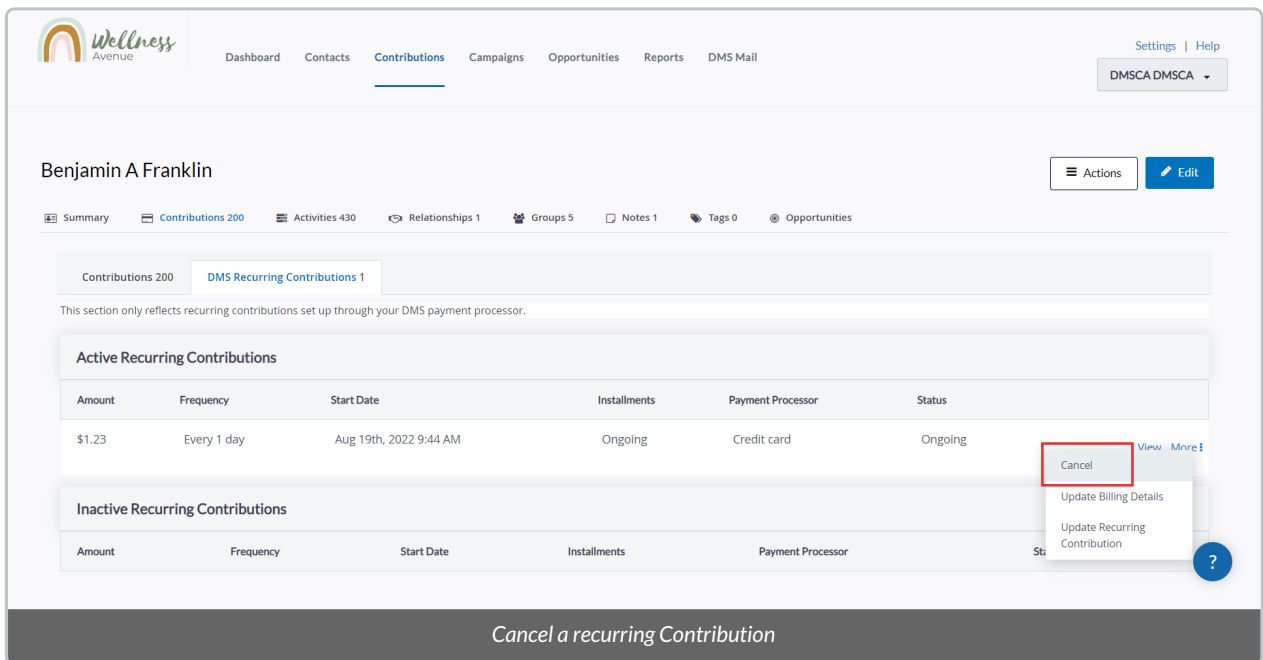
- **Number of Installments:** Total number of payments to be made. Set this to 0 if this is an open-ended commitment i.e. no set end date.
- **Next Scheduled Contribution Date:** when you would like the next payment to be made by the donor.
- **Notify Contributor:** you can notify the Contact/donor of these changes.
- **Campaign:** the Campaign associated with this donation.
- **Fund:** the Fund this donation is going into.
- **Status:** whether DMS Payments has been Cancelled, Completed, etc.
- **Start Date:** when the payments will start. You can only select a date from the time you're adding this Online Contribution or a future one.

4. If you decide to notify the Contact of these changes, they'll receive an email notification mentioning the changes you've made to their DMS Payments.

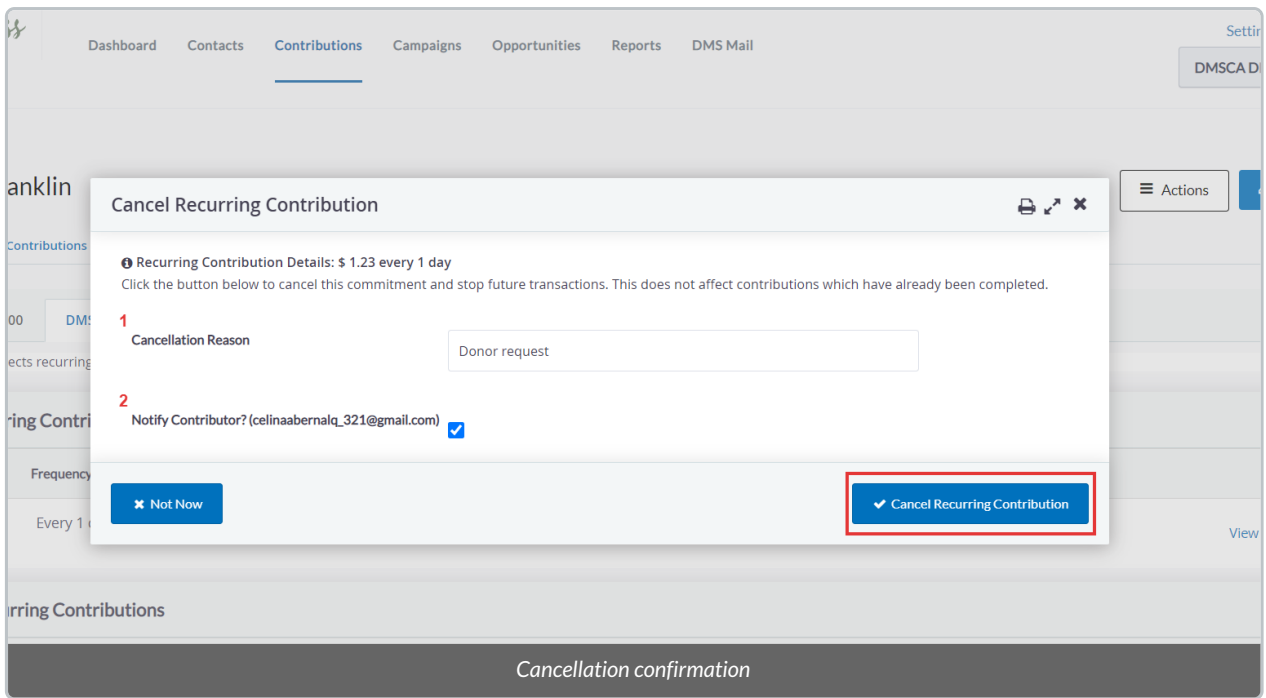


Cancelling a Single DMS Recurring Contribution

1. Follow the steps above to identify the DMS Recurring Contribution you're looking to cancel
2. After selecting *More*, select **Cancel**



3. In the popup window, you can (1) add the **Cancellation Reason** and also (2) notify the **Contact** that the recurring donation has been cancelled



4. If you decide to notify the Contact of these changes, they'll receive an email notification mentioning that their DMS Recurring Contribution was cancelled:

